

VIEWS, SEARCH, COMMAND BAR, AND FORMS



A QUICK REFERENCE GUIDE FOR AKOYAGO

INTRODUCTION

This guide gives a brief overview of Views, Search, the Command Bar, and Forms in akoyaGO.

DEFINITION

A view is a list of records for an entity, consisting of groups of columns and rows of information. When you select an entity in the navigation bar, a view is displayed which lists records for that entity.

OVERVIEW

Multiple views can be defined for each entity. Each view has its own selection criteria making it easier to find the records in which you are interested. For example, you could have a view with All Contacts (active and inactive) and a view with Active contacts. Views are customizable.

The following is a view that lists Active Contacts. The view can be changed to another pre-defined view by pressing the down arrow next to the view name, for example, Inactive Contacts.

The screenshot shows the akoyaGO interface. On the left, a dropdown menu is open for 'Active Contacts*'. The menu lists various view options, including 'Active Contacts in MN', 'Active Contacts-MN and/or CO', 'All Active Contacts in MN or CO', 'All Active Contacts in MN or CO-Filtered', 'All Contacts with Marital Status', 'All Contacts-Status Reason', 'Contact Mailing List for Minnesota', 'Contacts', 'Active Contacts Subgrid View', 'Active Contacts*', 'All Contacts', 'Contact Mailing List', 'Contacts Being Followed', 'Contacts I Follow', 'Contacts: No Campaign Activities in Last 3 Months', 'Contacts: Responded to Campaigns in Last 6 Months', 'Donor Portal Connections', 'Excluded Contacts Campaigns', 'Inactive Contacts', 'Leoacv Societv Members', 'Save as new view', and 'Reset default view'. A red arrow points to the 'Active Contacts*' option in the dropdown. Below the dropdown, a list of contact records is displayed. The records are organized into columns: Full Name, Email Address, and Business Phone. The records include names like Alan Johnson, Alan Rickman, Alice Davis, Alyson Belvin, Alyson Belvin, Annie Labrith, Ashton Altieri, Barney Whicker, Barry Radford, Brian Breckenridge, Bridget Zaun, Bruce Wiggins, Carolle Phillips, Christopher Williams, Christy Petersen, and Craig Christensen. The 'Inactive Contacts' option in the dropdown is also highlighted with a red box.

Full Name	Email Address	Business Phone
Alan Johnson	A@cant.comx	613-731-0000
Alan Rickman	potter@movies.org	6519999999
Alice Davis	alice@wedwayenterprises.com	(213) 210-3352
Alyson Belvin	alyson@akoyago.com	6127676701
Alyson Belvin	alyson@bromelbootkamp.com	(612) 767-6701
Annie Labrith	annie@bromelkamp.com	398-234-0000
Ashton Altieri	ashton@cbsdenver.com	(303) 861-4444
Barney Whicker	trent@akoyago.com	651-967-5309
Barry Radford	ymcamontana@bigsky.net	(569) 294-8723
Brian Breckenridge	Brian@PeacThroughHumanity.org	(406) 327-0025
Bridget Zaun	bzaun@DuluthMN.gov	(218) 730-5580
Bruce Wiggins	bwiggins@milwaukeeurbangardens.xorg	(414) 431-1585
Carolle Phillips	carol@marybethrhodesfoundation.com	123-456-7890
Christopher Williams	CWilliams@ASI.xcom	(612) 871-4912
Christy Petersen	christy@swedish.org	(612) 871-4910
Craig Christensen	goodkid143@dcpa.org	303.893.4000

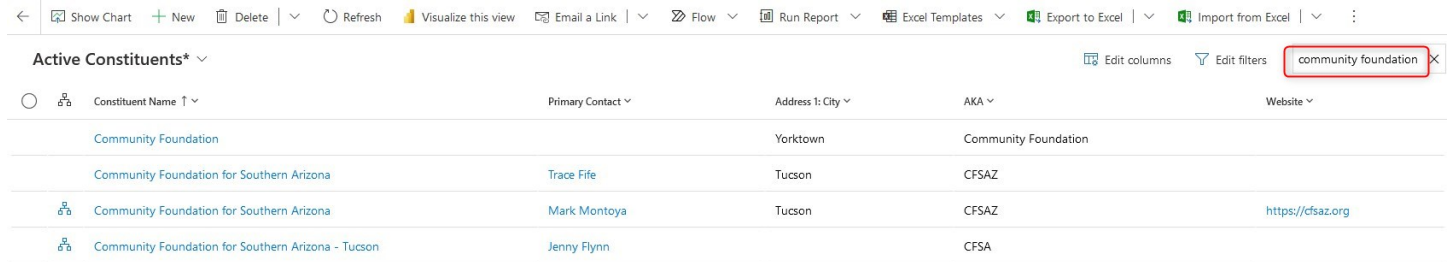
SEARCHING

There are two ways to search for a specific record: quick search and dataverse search.

QUICK SEARCH

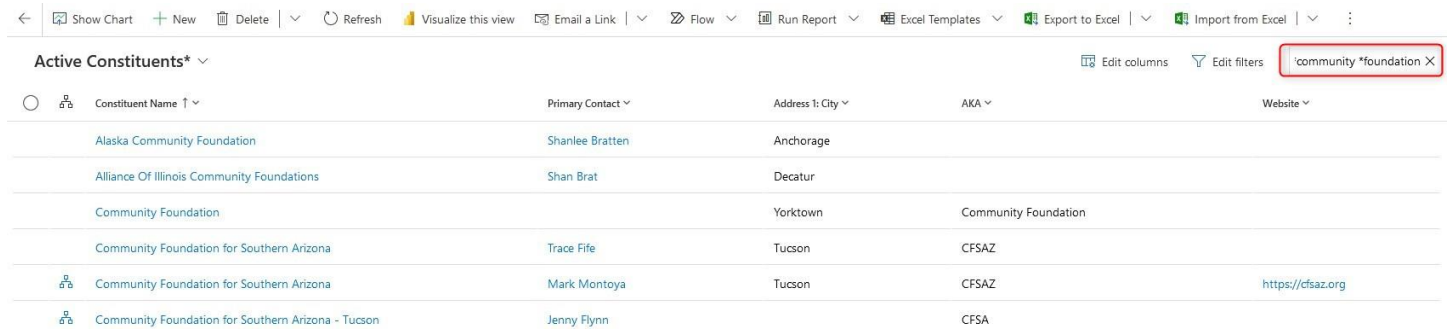
Quick search is available on the top righthand corner of the view. It searches for entries that match your search criteria for that entity type within that view.

You can use multiple search strings, each with an asterisk in front to help narrow down your search. For example, if you entered 'community foundation' in the quick search, the results would only contain records beginning with 'community foundation'.



Constituent Name	Primary Contact	Address 1: City	AKA	Website
Community Foundation		Yorktown	Community Foundation	
Community Foundation for Southern Arizona	Trace Fife	Tucson	CFSAZ	
Community Foundation for Southern Arizona	Mark Montoya	Tucson	CFSAZ	https://cfsaz.org
Community Foundation for Southern Arizona - Tucson	Jenny Flynn		CFSA	

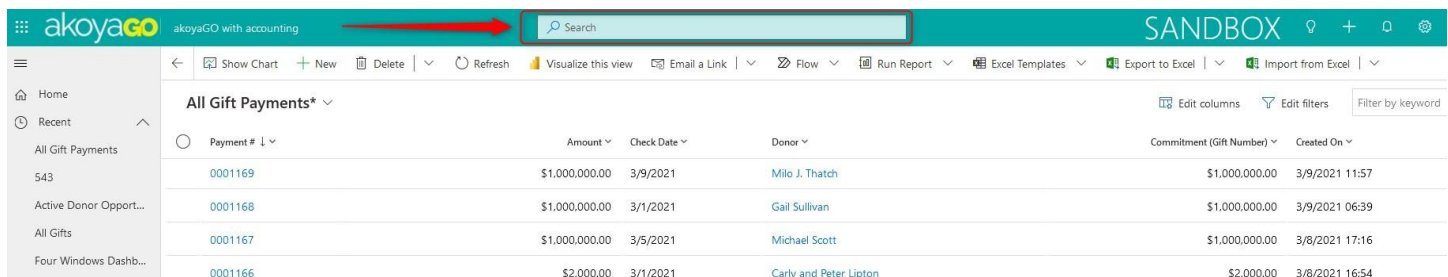
But if you enter *community *foundation in the quick search, the results will find records that have both community and foundation located anywhere in the name.



Constituent Name	Primary Contact	Address 1: City	AKA	Website
Alaska Community Foundation	Shanlee Bratten	Anchorage		
Alliance Of Illinois Community Foundations	Shan Brat	Decatur		
Community Foundation		Yorktown	Community Foundation	
Community Foundation for Southern Arizona	Trace Fife	Tucson	CFSAZ	
Community Foundation for Southern Arizona	Mark Montoya	Tucson	CFSAZ	https://cfsaz.org
Community Foundation for Southern Arizona - Tucson	Jenny Flynn		CFSA	

DATAVERSE SEARCH

Dataverse search looks across entities. While quick search only looks within an entity in a view, dataverse search spans all entities. It is located at the top middle section of your database.



Payment #	Amount	Check Date	Donor	Commitment (Gift Number)	Created On
0001169	\$1,000,000.00	3/9/2021	Milo J. Thatch	\$1,000,000.00	3/9/2021 11:57
0001168	\$1,000,000.00	3/1/2021	Gail Sullivan	\$1,000,000.00	3/9/2021 06:39
0001167	\$1,000,000.00	3/5/2021	Michael Scott	\$1,000,000.00	3/8/2021 17:16
0001166	\$2,000.00	3/1/2021	Carly and Peter Lipton	\$2,000.00	3/8/2021 16:54

When searching for 'foundation', the search in the example below returns results for Constituents, Donors & Prospects, Email Messages, etc.

The screenshot shows the akoyaGO interface with the search bar containing 'foundation'. The search results are displayed under the 'Search results' tab. The results are categorized by table: Top results, Constituents (92), Donors & Prospects (33), Email Messages (234), GOApply Status Tracking (62), Gifts (39), Contacts (37), Gift Payments (22), Interfund Grants (18), Requests (10), and Payments and Requirements (10). A message indicates that 20 of 562 results for 'foundation' are shown from 24 tables. The results are displayed in a table format with columns: Constituent Name, Primary Contact, Address 1: City, Main Phone, Website, and Tax ID.

Constituent Name	Primary Contact	Address 1: City	Main Phone	Website	Tax ID
RTC Foundation	Ryan Cochran				
Cdf Foundation	Marge Simpson	Monticello			83-0963387
Blue Foundation	Derek Green	Beverly Hills	8992349819	https://blue.org	

In this example, searching for 'Smith Foundation' is searching for Smith or Foundation.

The screenshot shows the akoyaGO interface with the search bar containing 'smith foundation'. The search results are displayed under the 'Search results' tab. The results are categorized by table: Top results, Contacts (48), Constituents (96), Donors & Prospects (35), Gifts (40), Email Messages (234), GOApply Status Tracking (62), Gift Payments (26), Interfund Grants (18), Funds (11), and Requests (10). A message indicates that 8 of 591 results for 'smith foundation' are shown from 24 tables. The results are displayed in a table format with columns: Full Name, Parent Constituent, Job Title, Email Address, Business Phone, and Salutation.

Full Name	Parent Constituent	Job Title	Email Address	Business Phone	Salutation
Joe Smith	ACLU Nebraska Foundation, Inc.				Joe
Deb Smith	The Ames Varner Family Found...	Senior Program Officer	deb@AVFoundation.xorg		Deb
Sally Smith	Community Foundation				Sally
Jessica Smith	Stillwater Community Foundati...		jessica@scf.com	651-439-7878	Jessica

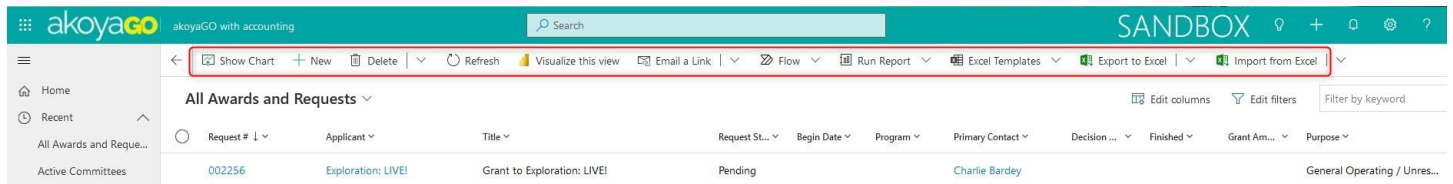
However, by adding a "+", Smith + Foundation looks for Smith and Foundation.

The screenshot shows the akoyaGO interface with the search bar containing 'smith + foundation'. The search results are displayed under the 'Search results' tab. The results are categorized by table: Top results, Contacts (4), Constituents (2), Donors & Prospects (2), and Gifts (1). A message indicates that 9 of 9 results for 'smith + foundation' are shown from 24 tables. The results are displayed in a table format with columns: Full Name, Parent Constituent, Job Title, Email Address, Business Phone, and Salutation.

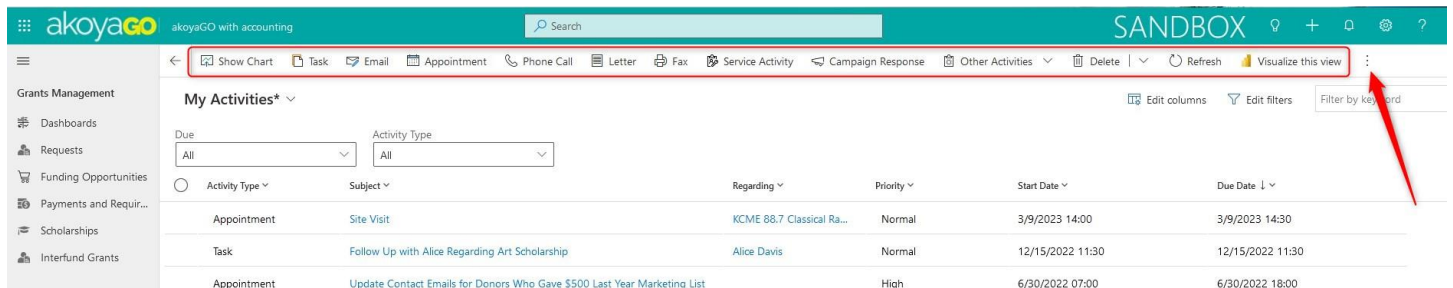
Full Name	Parent Constituent	Job Title	Email Address	Business Phone	Salutation
Joe Smith	ACLU Nebraska Foundation, Inc.				Joe
Deb Smith	The Ames Varner Family Found...	Senior Program Officer	deb@AVFoundation.xorg		Deb
Sally Smith	Community Foundation				Sally
Jessica Smith	Stillwater Community Foundati...		jessica@scf.com	651-439-7878	Jessica

COMMAND BAR

There is a command bar at the top of the view that lists actions that can be performed on the view.



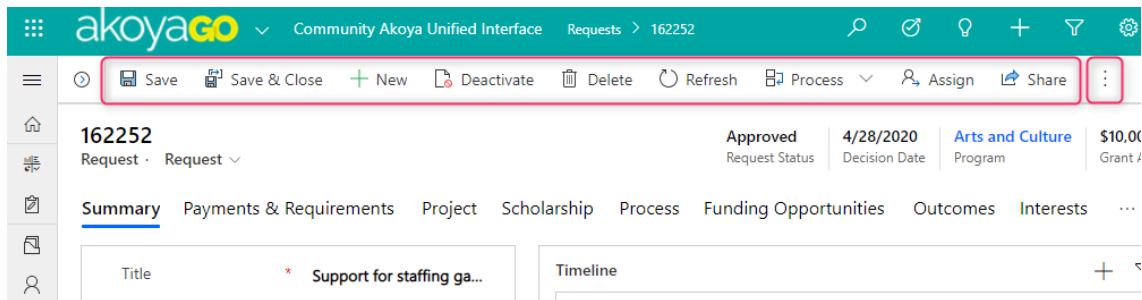
The command bar actions may change depending on the view. Best practice: Throughout akoyaGO, the ellipses (3 dots) to the right of the command bar lists additional commands that are available. Remember to click here for more functionality.



FORMS

Forms lists the details for an individual record. From a view, select an entry and it will open a form which displays the details for that record. You create, edit, and view details for a record on a form.

The command bar at the top of the form indicates actions you can take on the record. The ellipses on the right of the command bar list other available actions.



If you have any questions, please contact support@akoyago.com or 877-767-6703 and we're happy to help!